

Configuring Insurance in SiteLink

Obtaining a Unique ID Number

Step 1: The self-storage customer must contact the insurance vendor to establish an account.

Step 2: The insurance vendor or the client enter the following information on this sheet below and FAX it to SMD Technologies at (919)865-0789.

- a) Name, address and phone number of the self-storage company.
- b) An ID number for the self-storage site. Insurers issue such an ID or account number and refer to it as either a "Project Number," "ID number," or "Operator-Site Number."

Step 3: SMD faxes this sheet back to the customer and provides the customer with the SMD Project ID #, located in the box below. The customer then enters the SMD Project ID # into SiteLink.

Entering the Unique ID Number into SiteLink

To set up insurance in SiteLink, go to the Insurance Item on the Setup Checklist (found on the Company Screen).

Step 1: Select your insurance company from the Insurance Setup Screen.

Step 2: Click on the Edit button to enter the SMD Technologies ID number. After entering the SMD Technologies ID number, the site's Insurance ID (also called Project Number, Operator-Site Number, etc.) will appear in the Project # field. SiteLink is now enabled for tenant insurance.

Please add any additional company and insurance information here:

Name:

Company Name:

Address:

Phone Number:

Fax Number:

SiteLink Keycode:

Insurance Provider & Project # (also called ID, Op, or Site #):

SMD ID# -

Please enter this number on the Company Set Up screen-Invoice and Insurance